



West Lothian  
Council

# **HR21 Employee & Manager Self Service**

## **Employee User Guide**

**HR Services**  
**January 2015 – Version 8**

## Contents

1. WHAT IS HR21 .....	3
2. PASSWORD PROTECTION.....	4
2.1 Password Rules .....	4
2.2 Password Expiry .....	4
2.3 Locked Accounts/Password Resets .....	4
3. GETTING STARTED .....	5
4. WHAT YOU CAN SEE AND DO .....	7
4.1 Changing your name .....	7
4.2 Changing your address and adding next of kin .....	9
4.3 Submit a Claim for Overtime.....	10
4.4 Submit a Claim for Mileage.....	13
4.6 View and Print a Print Payslip.....	19
4.7 View your Payroll Record .....	21
4.8 View your Leave Record.....	22
4.9 View your HR Record .....	22
5. HOW TO EXIT HR21 .....	23

## 1. WHAT IS HR21

HR21 is a secure online system which will allow you to view and update your personal HR information held in the council's HR and Payroll system. This means that you can be sure that important HR information about you is always up to date.

You can also view basic job related information including payments made to you and submit an electronic request for any overtime worked and mileage and expenses incurred to your manager for approval. There is an online help function and relevant user information provided on each screen.

Details	Manager	Employee
Personal details	View	Update
Home address and contact details	View	Update
Contact details for next of kin	View	Update
Current position details	View	View
The grade of your current post	View	View
Allowances paid to you	View	View
Previous payments		View
Bank Account details		View
Your tax code		View
Last salary paid to you		View
Deductions from salary		View
Your pension contribution rate		View
Pay adjustments		View
Sick Leave	View	View
Maternity / Paternity leave	View	View
Leave for family care purposes	View	View
Overtime claims	Authorise	Update
Mileage and Expenses claims	Authorise	Update
Licence & Cert. Details	Add/Update	View

## 2. PASSWORD PROTECTION

Employee Self Service is designed with security and accessibility in mind.

### 2.1 Password Rules

All passwords must contain at least 8 characters and a mix of alphabetical letters and special characters e.g. / \* ^ & % and must end in a number.

E.g. Selfservice/9

Users can change their password whenever they wish, however passwords are only valid for 60 days and you are unable to re-use previous passwords.

### 2.2 Password Expiry

The system will notify you in advance of your password expiring. A message will be displayed when you log in. "Password has expired" – You must repeat the old password in the pink box then create a new password" – Access has been denied". **You must enter your old password in pink box before creating a new password.**

### 2.3 Locked Accounts/Password Resets

If an incorrect password is entered a message advising you of this is shown and after three attempts you will be locked out of the system. If you require to be unlocked or have forgotten your password and need your password to be reset you should email HR21 helpdesk at: [HR21Queries@westlothian.gov.uk](mailto:HR21Queries@westlothian.gov.uk) and your password will be reset.

**The reset password that is sent by email from HR21 Queries is classed as your old password which should be entered in the pink box.**

**If you have not saved the link to your Favourites / Desktop please click on link which can be found on the email sent by HR.**

### 3. GETTING STARTED

You can access HR21 through My Toolkit - HR Services – Employee Self Service, or by going to <https://hr21.westlothian.gov.uk/>

We recommend you save this link to your Favourites or to your desktop. To add to your favourites right click on link and select copy, click on add a favourite, paste in Name and click Add. (Please note that the system can only be accessed from a PC connected to the council network)

All employees have their own unique user id, which is their employee number and you will be asked to create a password when first accessing the system.

This is the screen which will appear when you have entered the one time password issued by HR, before you create a new password you must re enter your old password in the pink box. (Passwords issued by HR are always your “old password”)

Before enter new password you must enter your old password again in pink box

Login ID: 300413

Password: [Pink Box]

New Password: [ ]

Enter

BRE017:Password expired - You must repeat the old password in the pink box then create a new password BRE103:Access has been denied.

Contact HR if you have forgotten your password.

HR Employee and Manager Self Service

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Frontier software

Once logged in, your details will appear in the tool bar.

Do not use the back button, to navigate through screens as this will lock you out of the system. To go back to a previous screen, click on [Previously Visited Pages](#).

There is an online help function and relevant user information provided on each screen.

If an incorrect action is performed an Error message will show. It is advisable to clear these messages after each incorrect action by clicking on Clear button. Some fields are mandatory and these will be highlighted in **Pink** if missed.

This is the navigation screen, allowing you access to all areas of the system:



## 4. WHAT YOU CAN SEE AND DO

### 4.1 Changing your name

- Select the Details option under HR on the drop down menu

The screenshot shows the West Lothian Council HR system interface. At the top, there are logos for EFQM, Investors in People, and the West Lothian Council. The main navigation bar includes 'Payroll', 'Leave', 'HR', and 'Options'. The 'HR' menu is expanded, showing 'Details', 'Addresses', 'Position Details', and 'Licences & Cert. Details'. The 'Details' option is highlighted. Below the navigation bar, the user's profile is displayed: Staff Member 3004135, Title Mrs, Name Tester, Date Joined 31/07/1989, Position Section Leader. The footer includes the Frontier Software logo and copyright information.

- Input your new name, marital status and date of change
- Click on **verify** to check the details

The screenshot shows the 'Details' page in the West Lothian Council HR system. The page header includes the same logos and navigation bar as the previous screenshot. The 'Details' menu is selected. Below the header, there is a section for 'DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL' and a note: 'Personal details can be changed here. Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.' A row of buttons is visible: Refresh, New / Change, Verify, Save, Delete, Notes, Attach, Print, Help. The main form contains fields for personal information: Title (MRS), First Name (Tester), Second Name (Marie), Surname (Test), Preferred Name, Birth Date (24/03/1959), NI Number (NX111111B), Date Joined Company (31/07/1989), Email Address (Test.Tester@westlothian.gov.uk), Marital/Civil Status (MARRIED), and Marital Status Date. A dropdown menu for Marital/Civil Status is open, showing options: DIVORCED, MARRIED, SEPARATED, WIDOWER, SINGLE, UNKNOWN, and WIDOW. The footer includes the Frontier Software logo and copyright information.

- Ticks will appear in the areas where you have made changes.

Staff Member **3004135** Title **Mrs** Surname & Initials **Test T M** First Name **Tester** Date Joined **31/07/1989** Position **Section Leader**

[Previously Visited Pages](#)

[HR](#) > [Details](#)

**Details**

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

Personal details can be changed here.

Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.

[Refresh](#) [New / Change](#) [Verify](#) [Save](#) [Delete](#) [Notes](#) [Attach](#) [Print](#) [Help](#)

Title	<input type="text" value="MS"/>	✓
First Name	<input type="text" value="Testing"/>	✓
Second Name	<input type="text" value="Marie Claire"/>	✓
Surname	<input type="text" value="Tester"/>	✓
Preferred Name	<input type="text"/>	
Birth Date	<input type="text" value="24/03/1959"/>	
NI Number	<input type="text" value="NX111111B"/>	
Date Joined Company	<input type="text" value="31/07/1989"/>	
Email Address	<input type="text" value="Test.Tester@westlothian.gov.uk"/>	
Marital/Civil Status	<input type="text" value="DIVORCED"/>	✓
Marital Status Date	<input type="text"/>	

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- If the changes are not correct, click **refresh** and the screen will revert to the original entries.
- If you are happy that these changes are correct, click **save** to update.



## 4.2 Changing your address and adding next of kin

If you move it is important that you advise us of your new address. You may also provide contact details of next of kin if you wish and personal mobile numbers can also be added.

- Input the new details
- Click **verify** to check the changes
- If you are happy that these changes are correct, click **save** to update.

The screenshot shows the 'Addresses' section of a web application. At the top, there's a green header with the title 'Addresses' and a small icon. Below the header, a grey box contains a data label: 'DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL'. A message below that states: 'You can make a change to your home address here. You can also add or update contact details for your next of kin. Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.' Below this is a toolbar with buttons: 'Refresh', 'New / Change', 'Verify', 'Save', 'Delete', 'Notes', 'Attach', 'Print', and 'Help'. The main form area has several input fields: 'Address Type' (a dropdown menu currently showing 'CURRENT HOME ADDRESS'), 'Contact Forename', 'Contact Surname', 'Contact Relationship' (a dropdown menu), 'Address' (a multi-line text area with 'THE COTTAGE' and 'SOMEWHERE' entered), 'Postcode' (with 'EH22 8JN' entered), 'Home Phone No', 'Personal Mobile No', and 'Personal Email'. Below the form is a table with one row: 'CURRENT HOME ADDRESS'. To the right of the table is a 'Search:' input field. At the bottom of the table, it says 'Page 1 of 1 (1 items)'. The footer of the page contains logos for 'HR' and 'Frontier software', along with copyright information: 'Site Map | Version | Copyright © 2013 Frontier Software, All rights reserved. HR & Payroll Solutions - Software / Services | www.frontiersoftware.com'.

### 4.3 Submit a Claim for Overtime

Only normal overtime working can be submitted in HR21. Standby payments / Standby overtime / Call outs and Sleep Ins claims **cannot** be submitted in HR21 and these should therefore continue to be submitted in the format used prior to the introduction of HR21.

#### Arrangements for Payment of Overtime

Overtime at enhanced rates will only apply when 36 hours a week have been worked.

Overtime will only be paid for complete 30 minutes of work.

Employees working overtime must take a break after 6 hours, this break will be unpaid.

Employees graded Band I and over are not entitled to overtime payments.

All claims are submitted and paid a month in arrears and the deadline date for submission of approved claims is the 10<sup>th</sup> of the month. Any claims approved after the 10<sup>th</sup> of the month will be carried forward to the next pay period.

If an overtime payment does not show in your salary as you expect you should check the status of your claim by selecting Timesheet Application from the Payroll drop down menu. If the status of your claim is “Approved” but you have not received the payment this means that it was approved by your manager after the submission deadline and you will receive the payment the following month. Overtime claims which have been processed by Payroll will be visible in Timesheet History.

#### Submitting a Claim for Overtime

To make a claim for overtime click select the **Timesheet Application** option from the **Payroll** drop down menu.



- Click **Add** to start claim
- **Period Ending Date** – enter the last day of the month for which you are claiming overtime, e.g. for a submission of overtime worked in July the period end date would be 31/07/2014.
- **Sequence** – this should be 1. If you have already submitted a claim for the month and wish to submit another claim then the next sequence number that must be used is 2. E.g. Entries keyed for 01/08/14 to 10/08/14 using sequence 1. If you wish to make another claim for 11/08/14 to 20/08/14 you must use sequence 2.
- **Date Worked** – input the date(s) you are claiming overtime for. **The system will not allow a duplicate claim to be made – i.e. If you already have a claim “Holding”**

or “Submitted” with the same dates then you will not be able to submit a further claim.

- **Pay element** – select from the drop down box whether payment is at plain time, time and half or double time.
- **Details** – Input the reason for the overtime working.
- **Time from and Time To** – select the appropriate start and finish times remembering to exclude any breaks you have had. **Please be aware when clicking on Time To you must choose a time from the drop down list, if a Time To is not chosen it will default to midnight and hours worked will be incorrect.**
- **If more than six hours overtime has been worked in one day you must key two entries in your claim to show a break has been taken.**
- **Cost Centre** – When you save your overtime claim this will automatically be charged to your own cost centre – **you do not have to manually key it.** If it has to be charged to different cost centres please do as follows
  - Click on the box containing 3 dots next to the Cost Centre field
  - The dialogue box that appears contains a full list of cost centres. You have the option to search by code, cost centre or description by selecting the option you wish to use from the drop down list at the top left of the dialogue box
  - After selecting the search option, enter the details of the code, cost centre or description in the search box at the top right of the dialogue box and then double click on cost centre required to update your claim. Please ensure the correct cost centre is used
  - **Please note that not all cost centres are available in HR21 e.g. Capital Budget Codes. If you cannot find the cost centre you require please speak to your manager.**

**Timesheet Application**

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

Overtime claims are made here. To submit a claim please refer to the HR21v3 User guide for process.  
Overtime is not payable for breaks. You must take a minimum 30 minute break if working more than 6 hours. If you do work more than 6 hours key 2 separate entries 1. Start to break .2 End of break to Finish. Time From - Time To must be populated or incorrect hrs will be paid.

Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.

Refresh Add Verify Save Delete Notes Attach Print Help

Period Ending Date: 30/09/2014 Sequence: 1 Hours Total: 0.25 Status: Approved Submit for Approval ☐

Date Worked	Pay Element	Details	Time From	Time To	Total Hours	Cost Centre
6/09/2014	Overtime at plain time	TEST UPDATES	5:00 PM	5:15 PM	0.25	

Search:

Period Ending Date	Sequence	Status
30/09/2014	1	Approved
30/09/2014	2	Rejected

If OT for own cost centre – will automatically update when saved. **DO NOT KEY**

**Timesheet Application**

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

Overtime claims are made here. To submit a claim please refer to the HR21v3 User guide for process.  
Overtime is not payable for breaks. You must take a minimum 30 minute break if working more than 6 hours. If you do work more than 6 hours key 2 separate entries (1. Start to break then 2. End of break to Finish)

Please be aware that the Notes facility is for you as a user and will not be reviewed by the payroll team.

Refresh Add Verify Save Delete Notes Attach Print Help

Period Ending Date: 31/10/2014 Sequence: 1 Hours Total: 3.00 Status: Approved Submit for Approval ☐

Date Worked	Pay Element	Details	Time From	Time To	Total Hours	Cost Centre
1/10/2014	Overtime at time half	dxvxcvxcv	5:15 AM	8:15 AM	3.00	A005

Field Picker Code Search Go

Code	Cost Centre	Description
A001	10201	10201 Chief Executive
A002	00202	00202 Consumer Unit
A003	00203	00203 Business Change
A004	00204	00204 Corporate Comms
A005	10210	10210 Central Hospitality
A006	00211	00211 Member Services
A007	00250	00250 Reg of Births etc
A008	10251	10251 Emergency Planning
A009	14280	14280 Head of Finance
A010	14281	14281 Finance Typists
A011	14282	14282 Financial Mgmt
A012	00283	00283 Business Supp Ops
A013	14284	14284 Revenues
A014	14285	14285 Internal Audit
A015	00290	00290 IT Services

Search:

1 2

☐ Current Only

OT charged to a different cost centre- click on drop down box to view list

- Once all details have been completed then select the **Y** in the **Submit for Approval** box and then click on **Save**.

You will receive a message to confirm that your entry has been added successfully and an email will be sent to your inbox, confirming that your claim has been forwarded to your manager for approval.

You will receive a further email advising whether your claim has been approved or rejected.

If your claim is rejected you should contact your manager in the first instance to discuss this. If your claim requires to be amended please **amend claim** and resubmit for approval by selecting Y in the Submit for Approval box and clicking Save. **Do not submit a new claim.**

Your manager must approve your claim within the 7 day escalation period (7 day period begins from the date you have submitted your claim and includes Saturday and Sunday) after this time claim will escalate to his / her manager for approval. **Any claim approved after the 10<sup>th</sup> of the month will be carried forward to the next pay period.**

## Timesheet History

By selecting the Timesheet History option from the drop down menu you can view all overtime claims submitted and paid to you in previous salaries

## 4.4 Submit a Claim for Mileage

### Arrangements for Paying Mileage

Before submitting a claim for mileage, you must ensure you are authorised to use your own car for business journeys. You must have a valid Driving Licence / Insurance (which covers Business use) / MOT if applicable; if your car is not eligible for an MOT you must present your car registration document to your manager. As a new user you should also have completed an Own Vehicle Use Authorisation form.

You must present your valid documents to your manager and only your manager can update Licence & Details screen in HR21. If there are no documents recorded or if one or all of your documents are no longer valid the system will not allow you to submit a claim.

You can view the status of all of your documents by selecting the Licenses & Cert Details option from the HR drop down menu. If any of your documents are missing or require to be updated you must present your valid documents to your manager. Only your manager can update Licence & Cert screen. These documents should be reviewed on an annual basis by your manager.

### Changing Your Car

If you change your car the current insurance document and MOT (if applicable) effectively become invalid. Therefore you must present your new insurance and MOT (if applicable) documents to your manager. If your car is not eligible for an MOT you must present your new car registration document to your manager.

Your manager is required to check and update Licence & Details screen in HR21 before approving any claims.

Claims for mileage and expenses must be made in accordance with the council's Business Travel and Subsistence Policy which can be found at:

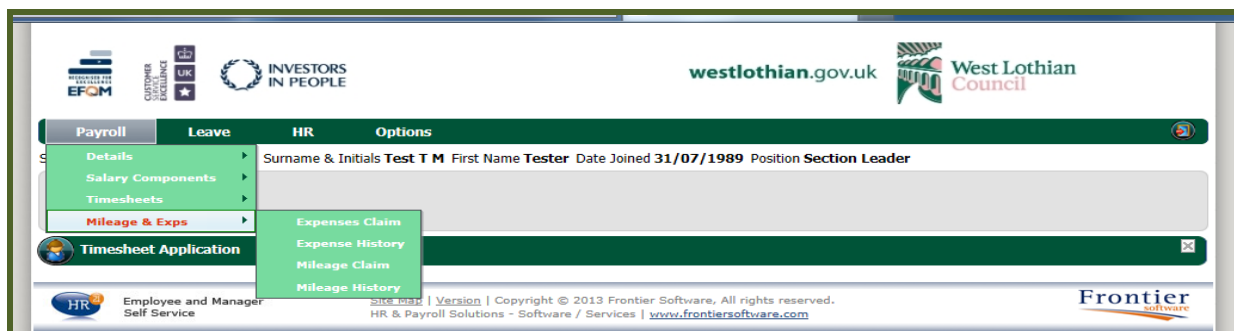
<http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1665&p=0>

**All claims are submitted and paid a month in arrears and the deadline date for submission of approved claims is the 10<sup>th</sup> of the month.**

**If a mileage payment does not show in your salary as you expect you should check the status of your claim by selecting Mileage Claim from the Payroll drop down menu. If the status of your claim is "Approved" but you have not received the payment this means that it was approved by your manager after the submission deadline and you will receive the payment the following month. Mileage claims which have been processed by Payroll will be visible in Mileage History.**

### Submitting a Claim for Mileage

Select the **Mileage Claim** option from the **Payroll** drop down menu and a blank form will appear.



- Click **Add** to start a new claim
- **Month Ended Date** – enter the last day of the month for which you are claiming mileage, e.g. for a submission for mileage incurred in August the period end date would be 31/08/2014.
- **Date of Claim** – input the date(s) you are claiming mileage for. **The system will not allow a duplicate claim to be made – i.e. If you already have a claim “Holding” or “Submitted” with the same dates then you will not be able to submit a further claim.**
- **Claim Reason** – Must include a detailed account of the purpose of the journey – “Meeting” is not sufficient.
- **Business Miles Code** – Click on the drop down list and select the appropriate journey.

**Mileage Claim**

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

Claims must be made in accordance with the [Business Travel & Subsistence Policy](#) and the [Schedule of Mileages](#).  
 Claim reason must include full purpose of journeys. Specifying just “Meeting” is not enough. In the first instance the Council’s schedule of mileages should always be used when making a claim.

Notes facility - for own use only-not used by Payroll.

[Refresh](#)
[Add](#)
[Verify](#)
[Save](#)
[Delete](#)
[Notes](#)
[Attach](#)
[Print](#)
[Help](#)

Month Ended Date  Sequence

Date of Claim	Claim Reason	Journey From	Journey To	Business Miles	Business Miles Code
23/09/2014	ASDS	BPC	Midcalder	9.0	[Adale]-[Bathgate]
					[Adale]-[Blackridge]
					[Adale]-[Linlithgow CB]
					[Adale]-[Livingston]
					[Adale]-[Westfield]
					[Adale]-[Whitburn Cross]
					[Adale]-[Whitehill]
					[Bburn]-[Bellsquarry]
					[Bburn]-[East Whitburn]
					[Bburn]-[Polbeth]
					[Bburn]-[Seafield]
					[Bburn]-[West Calder]
					[BPC]-[Aberdeen]
					[BPC]-[Addiewell]
					[BPC]-[Armadale Acad]
					[BPC]-[Armadale Cross]

Total Business Mileage

Cost Centre

Select your car from the list. If your car is not on the list-email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) with Reg, Make, Model, Fuel Type & Eng CC. You will receive a confirmation email when your car has been added.

Registration number   CITROEN Status

VAT Receipt? ☒

By Submitting this Claim, you confirm to having the following: and have read & understood the council’s Travel & Subsistence Policy.

Valid Driving Licence ☒

- **Journey From/Journey To – Do not key anything in these fields**, these will automatically update when the relevant journey is selected from the Schedule of mileages in Business Miles Code field.
- **Business Miles – Do not key anything in these fields**, these will automatically update when the relevant journey is selected from the Schedule of mileages in Business Miles Code field.
- In the first instance the Council's Schedule of Mileages should always be used but there may be rare occasions that the journey you are claiming for is not included in Schedule of Mileages if so, you can enter the details manually in the above fields.
- **Cost Centre** – When you save your overtime claim this will automatically be charged to your own cost centre – **you do not have to manually key it**. If it has to be charged to different cost centres please do as follows
  - Click on the box containing 3 dots next to the Cost Centre field
  - The dialogue box that appears contains a full list of cost centres. You have the option to search by code, cost centre or description by selecting the option you wish to use from the drop down list at the top left of the dialogue box
  - After selecting the search option, enter the details of the code, cost centre or description in the search box at the top right of the dialogue box and then double click on cost centre required to update your claim. Please ensure the correct cost centre is used
  - **Please note that not all cost centres are available in HR21 e.g. Capital Budget Codes. If you cannot find the cost centre you require please speak to your manager.**
- **Registration Number** – To find your Car registration number click on the drop down box and a list of car registrations will appear. To find your own car enter your registration number in **Search**. **If your car is not on list you must email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk)** with registration, make, model, fuel type & engine CC. You will receive a confirmation email when your car has been added.

**Mileage Claim**

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

Claims must be made in accordance with the [Business Travel & Subsistence Policy](#) and the [Schedule of Mileages](#).  
Claim reason must include full purpose of journeys. Specifying just "Meeting" is not enough. In the first instance the Council's schedule of mileages should always be used when making a claim.

Notes facility - for own use only-not used by Payroll.

Refresh Add Verify Save Delete Notes Attach Print Help

Month Ended Date: 30/09/2014 Sequence: 2

Date of Claim	Claim Reason	Journey From	Journey To	Business Miles	Business Miles Code
23/09/2014	ASDS	BPC	Midcalder	9.0	

Total Business Mileage: 9.0  
Cost Centr: ...

Select your car from the list. If your car is not on the list-email [hr21queries@westlothian.gov.uk](mailto:hr21queries@westlothian.gov.uk) with Reg, Make, Model, Fuel Type & Eng CC. You will receive a confirmation email when your car has been added.

Registration number: 0012323 Status: Holding

By Submitting this Claim, you confirm to:

- ☒ Valid Driving Licence
- ☒ MOT (if applicable)
- ☒ INS - Business Use
- ☒ Medically Fit to Drive
- ☒ Claimed in Accordance with Council's

Month Ende	Sequen	Total Bus
30/09/2014	2	
30/09/2014	3	
30/09/2014	4	

1

Field Picker Registration Number Search GO

Registration Number	Type	Make	Model	Sub-model	Category
AM08 OJZ	C	TOYOTA	AYGO		E
P307 UCV	C	VAUXHALL	ZAFIRA		E
0012323	C	VAUXHALL	ASTRA		E
0013034	C	NISSAN	ALMERA		E
0E51 OZR	C	FORD	FIESTA		E
0U03 YGR	C	NISSAN	PRIMERA		E
1127 NGA	C	FORD	FOCUS		E
123 CAR	C	FORD	ESCORT		E
124 CAR	C	PEUGEOT	206		E
1383445	C	FORD	KA		E
16 SL	C	FORD	ESCORT		E
1A06 PUY	C	SAAB	9-5		E
200 BLJ	C	KIA	SEDONA		E
2141 WE	C	LEXUS	24		E
	C	PEUGEOT	306		E

1 2

Current Only

Page 1 of 1 (3 items)

- Tick the boxes confirming that you have a valid VAT receipt, driving licence, MOT (if applicable) insurance for business use and own vehicle user form.
- If you have more than 6 entries for your month's submission you will need to submit a new claim for the additional entries.
- Once all details have been completed then select the **Y** in the **Submit for Approval** box then click **Save**.

You will receive a message to confirm that your entry has been added successfully and an email will be sent to your inbox, confirming that your claim has been forwarded to your manager for approval.

You will receive a further email advising whether your claim has been approved or rejected. To find out why your claim has been rejected you must contact your manager. If your claim requires to be amended please **amend claim** click Save and it will automatically resubmit for approval. **Do not do a new claim**.

Your manager must approve your claim within the 7 day escalation period (7 day period begins from the date you have submitted your claim and includes Saturday and Sunday) after this time claim will escalate to his/her manager for approval. **Any claim approved after the 10<sup>th</sup> of the month will be carried forward to the next pay period.**



## 4.5 Submitting a Claim for Expenses

### Arrangements for Paying Expenses

Claims for expenses must be made in accordance with the council's Business Travel and Subsistence Policy which can be found at:

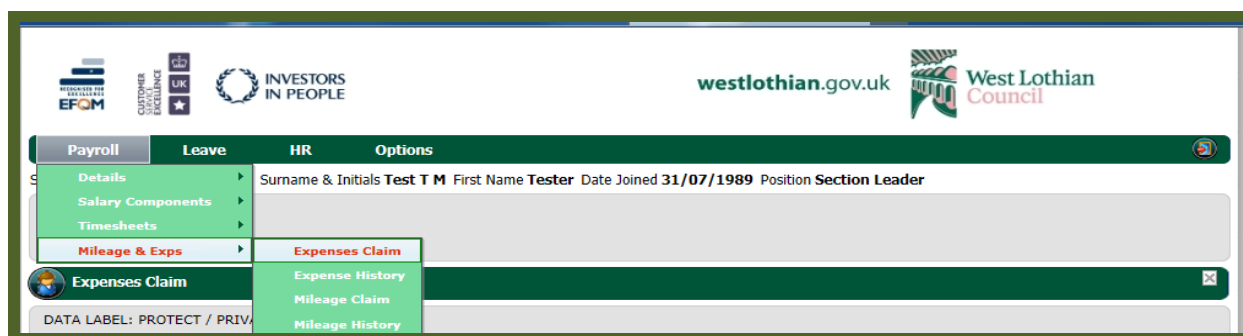
<http://www.westlothian.gov.uk/CHttpHandler.ashx?id=1665&p=0>

All claims are submitted and paid a month in arrears and the deadline date for submission of approved claims is the 10<sup>th</sup> of the month.

If an expense payment does not show in your salary as you expect you should check the status of your claim by selecting Expenses Claim from the Payroll drop down menu. If the status of your claim is "Approved" but you have not received the payment this means that it was approved by your manager after the submission deadline and you will receive the payment the following month. Expense claims which have been processed by Payroll will be visible in Expense History.

### Submitting a Claim for Expenses

Select the **Expenses Claim** option from the **Payroll** drop down menu and a blank form will appear

The screenshot shows a web application interface for West Lothian Council. At the top, there are logos for ECOM, Customer Excellence, and Investors in People, along with the council's website URL and logo. Below this is a navigation bar with tabs for Payroll, Leave, HR, and Options. The 'Payroll' tab is active, and a dropdown menu is open, showing options like Details, Salary Components, Timesheets, Mileage & Exps, and Expenses Claim. The 'Expenses Claim' option is highlighted. To the right of the dropdown, a user profile is visible with fields for Surname & Initials, First Name, Date Joined, and Position. Below the dropdown, there are links for Expense History, Mileage Claim, and Mileage History. A data label 'DATA LABEL: PROTECT / PRIV' is visible at the bottom left of the interface.

- Click **Add** to start a new claim
- **Month Ended Date** – enter the last day of the month for which you are claiming expense for e.g. for a submission of expense incurred in August the period end date would be 31/08/2014.
- **Date of Claim** – input the date(s) you are claiming expenses for. **The system will not allow a duplicate claim to be made – i.e. If you already have a claim “Holding” or “Submitted” with the same dates then you will not be able to submit a further claim.**
- **Claim Reason** – This must include a detailed account of the purpose of the expense.
- **Journey From/Journey To** – This must include full details of journey undertaken.
- **Tick** whether the receipt has a VAT element.

- **Expense Type** – select expense type from the drop down list.
- If you have more than 6 entries for your month's submission you will need to submit a new claim.
- Once all details have been completed then select the **Y** in the **Submit for Approval box** – then click **Save**.

You will receive a message to confirm that your entry has been added successfully and an email will be sent to your inbox, confirming that your claim has been forwarded to your manager for approval

You will receive a further email advising whether your claim has been approved or rejected. To find out why your claim has been rejected you must contact your manager. If your claim requires to be amended please **amend claim** click Save and it will automatically resubmit for approval. **Do not do a new claim.**

Your manager must approve your claim within the 7 day escalation period (7 day period begins from the date you have submitted your claim and includes Saturday and Sunday) after this time claim will escalate to his / her manager for approval. **Any claim approved after the 10<sup>th</sup> of the month will be carried forward to the next pay period.**

[Previously Visited Pages](#)

[Payroll](#) > [Mileage & Exps](#) > [Expenses Claim](#)

### Expenses Claim

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

This form is used to enter business travel expenses. You must enter details of the expenses including from and to destinations. Your manager will approve or decline your request. VAT should only be ticked if your receipt has vat included or contains a VAT registration number. Leave blank if in doubt. Before making a claim refer to the [Business Travel & Subsistence Policy](#). You must keep all receipts for 6 complete tax years.

[Refresh](#) [New/Add](#) [Verify](#) [Save](#) [Delete](#) [Notes](#) [Attach](#) [Print](#) [Help](#)

Month Ended Date:  Sequence:

Date of Claim	Claim Reason	Journey From	Journey To	Amount	VAT	Expense Type
5/08/2014	Systems Devel meeting - return journey	Civic Centr	Edinburgh	8.50	<input checked="" type="checkbox"/>	Train
10/08/2014	Project Planning meeting	Civic Centr	B/Gate PC	2.50	<input type="checkbox"/>	Bus
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

Cost Centr:  Total:

Status:

Submit for Approval:

Search:

Month Ended Date	Sequence	Total	Status
31/08/2014	1	11.00	Holding

## Mileage /Expense History

By selecting the mileage/expense history option from the drop down menu you can view all mileage and expense claims submitted and paid to you in previous salaries.

## 4.6 View and Print a Print Payslip

To view and print your latest payslip, select the **Pay History Details** option from the **Payroll** drop down menu.



The most recent monthly pay details will appear on the screen. Your payslip is generated by clicking on the **Payslip** button.

The screenshot shows the 'Pay History Details' page. At the top, there is a breadcrumb trail: 'Payroll > Details > Pay History Details'. Below this, there is a green header bar with the text 'Pay History Details'. The page contains a message about data labels and a breakdown of salary payments. The breakdown is presented in a table with columns for 'Amount' and 'Hours'. The 'Payslip' button is located at the bottom right of the table.

	Amount	Hours
Base Pay	1815.78	132.00
Overtime	783.56	37.50
Allowance Before Tax	0.00	
Deduction Before Tax	0.00	
Staff Pension	108.95	
Allowance After Tax	0.00	
Gross	2599.34	
Tax	340.60	
Deduction After Tax	167.00	
Employee NIC	207.05	
Student Loan Repayments	0.00	
Company Pension	306.87	
Net Pay	1778.16	



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West Lothian  
Council

Mrs T M Test 22 Street The Cottage Somewhere West Lothian EH54 5XX	233 - CC - HR Services
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Pay and Allowances				Deductions	
Description	Hours/Units/%	Rate	Amount	Description	Amount
Salary			1,834.02	PAYE tax deductions	178.00
				NATIONAL INSURANCE D(CO)	124.13
				Capital Credit Union	165.00
				Social Club	2.00
				Lothian Pension Fund	110.04
				NI Rebate (employees)	-2.55
Total Payments			1,834.02	Total Deductions	576.62

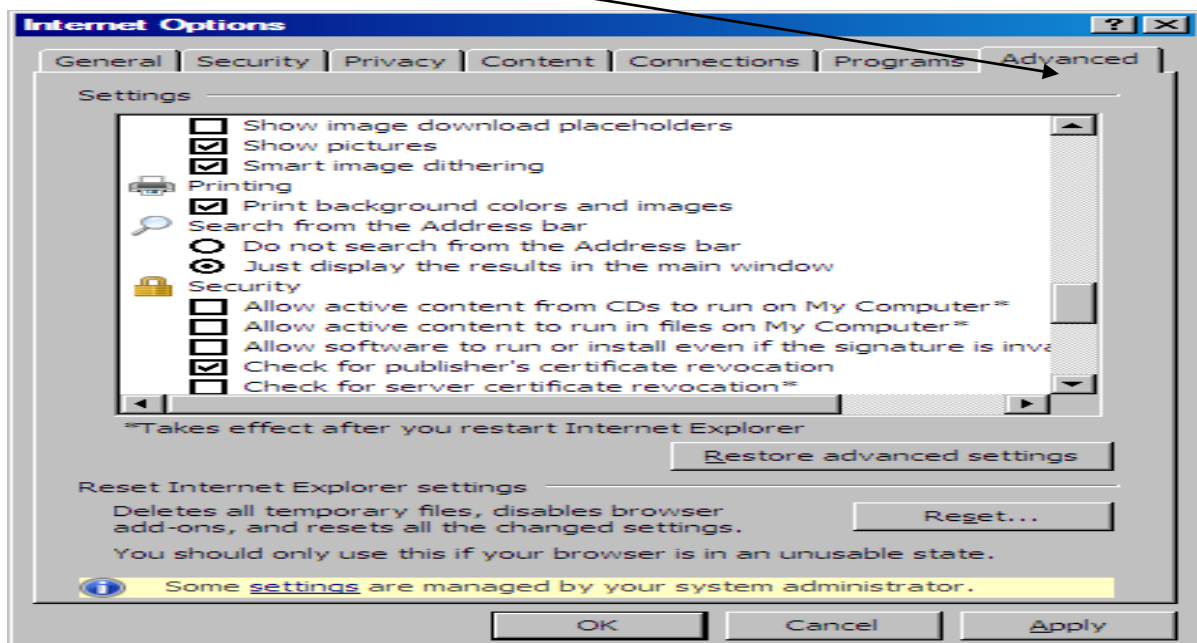
Net Pay 1,257.40

Pay Details			This Pay	Year to Date
Employee Number	3004135	Gross Pay	1,834.02	7,364.22
NI Number	NX111111B	Pension	110.04	440.16
NI Table	D	AVC's	0.00	0.00
Tax Code	1000L	Taxable Pay	1,723.98	
Pay Date / Tax Period	31/07/2014 (M04)	Tax	178.00	
Paid from / Paid to	01/07/2014 - 31/07/2014	NI	124.13	499.50
Overtime Paid to	30/06/2014	SMP	0.00	0.00
Paid by	Bank	SMP	0.00	0.00
		Annual Salary		22,008.29
		P45 Pay		
		P45 Tax		

See all employee discounts @ [www.wlcrewards.westlothian.gov.uk](http://www.wlcrewards.westlothian.gov.uk)

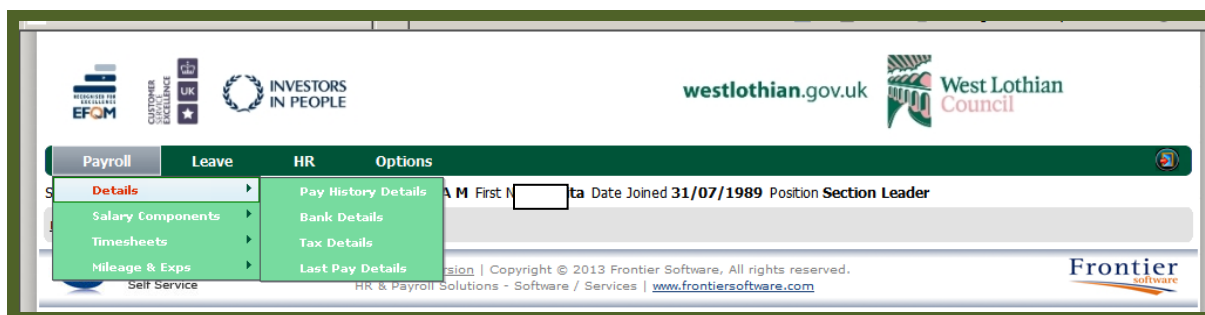
If the council logo does not appear in the print window click on **Tools** and go to **Internet Options**

Open the **Advanced** Tab tick the **Print background colours and images** – click Apply then click Ok



## 4.7 View your Payroll Record

The **Payroll** option on the drop down menu is where you will find salary information.



### Details

**Pay History Details** – provides a breakdown of previous payments made to you.

**Bank Details** – allows you to view your current bank details. If you wish to change your bank details then please complete a Bank Details Notification Form and send to HR Services. The form must be received in HR by the 10<sup>th</sup> of the month to allow for payroll to process the change in time for your salary to be paid into your new account.

**Tax Details** – provides information on your current tax code and national insurance number.

**Last Pay Details** – allows you to view the last salary payment made to you.



### Salary Components

**Salary** – provides details on your current grade and rate of pay. You can also view previous salary details. If you have more than one job you will only be able to view details on your main post.

**Allowances** – provides details of any allowances paid e.g. shift or unsocial hours payments.

**Deductions** – provides details of any deductions such as Trade Union subscription, Social Club fees etc

**Pay Adjustments** – provides details of expenses claimed along with any overpayments being deducted or previous underpayments being paid.

**Pension** – provides details of your pension contribution rates

## 4.8 View your Leave Record

The leave history screen provides information on any leave you may have had including sickness absence, maternity leave, strike days and any unpaid leave. Any annual leave or flexi leave will not be recorded here.

Staff Member 9999998 Title Dr Surname & Initials Testa O First Name Octavia Date Joined 17/10/2011 Position HR Worker

Leave > Leave History

Leave History

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

Details of the leave submitted by your manager on the weekly absence return is stored here.  
Annual leave and flexi time are not included.

If you have a query relating to the information held by us, please contact your line manager in the first instance.

[Refresh](#) [Add](#) [Verify](#) [Save](#) [Delete](#) [Notes](#) [Attach](#) [Print](#) [Help](#)

Leave Type	Start Date	End Date	Days Taken	Hours Taken	Reason
HOSP/CLINIC APPOINTMENT	8/07/2013	8/07/2013	1.00	7.20	

Search:

Leave Type	Start Date
HOSP/CLINIC APPOINTMENT	8/07/2013
Sickness Absence	1/02/2013

## 4.9 View your HR Record

**Position details** – provides information on your current post and previous posts with the council.

Staff Member 9999997 Title Miss Surname & Initials Testing E First Name Elvira Date Joined 1/01/2013 Position HR Worker

HR > Position Details

Position Details

DATA LABEL: PROTECT / PRIVATE & CONFIDENTIAL

Your employment history with the council can be viewed here.

[Refresh](#) [Add](#) [Verify](#) [Save](#) [Delete](#) [Notes](#) [Attach](#) [Print](#) [Help](#)

Start Date	End Date	Position Ref No	Paid Weeks/Year	Weeks Worked/Year
2/01/2013		HR Worker	52.14	52.14
1/01/2013	1/01/2013	Payroll Assistant	52.14	52.14

## 5. HOW TO EXIT HR21

It is important to ensure that you always securely log out of the system by clicking on the door icon in the top right hand corner of the screen.

